

Tutorial 6: Managing Multiple Worksheets and Workbooks

Objectives:

- **Format, edit and establish print settings for multiple worksheets at once**
- **Create cell references to other worksheets and workbooks**
- **Consolidate information from multiple worksheets using 3D references**
- **Create an Excel workspace**
- **Insert hyperlink**
- **Create a custom template**
- **Create a web page**

Case: Summarizing ticket sales for theme parks for the Global Travel company from individual worksheets for each quarter.

Open NM workbook and **save in the same folder** as New Mexico. Look at the worksheets and see that they are all same in labels and layout and only vary by actual values.

Want to be able to enter formulas which calculate Total Ticket Sales and Total \$ sold for each theme park for each quarter. Certainly easy enough to do with our current knowledge but since the data is same in each worksheet, want to be able to enter a set of formulas which is copied across into the individual worksheets.

Group worksheets worksheets and enter formula in one and it is automatically entered into the other members of the group.

1) How to group worksheets...

adjacent – select first and shift +click the last

non-adjacent – select first and ctrl+click each one desired

TO UNGROUP, SELECT A SHEET NOT IN GROUP OR RIGHT-CLICK ON A SHEET TAB OF GROUP MEMBER AND SELECT UNGROUP.

Let's group Quarter 1 to Quarter 4.

Take totals for first quarter ...copy across row. Enter label Totals in cell A13. Align labels.

Check additional sheets. Format Sales (\$) Accting 0 dec and Tickets Sold comma format

Consolidate

Want to be able to create another worksheet which has same labels as each of the quarters but which will contain the sum of all the related cells in the other quarters. Will use 3-D references.

2) Create a consolidation sheet Ctrl+click and drag or rightclick

To create a 3D reference general format is SheetName!cellrange

If sheet name does not contain spaces ...Quarter1!B6

If sheet name contains space....enclose sheet name in single quote---'Quarter 1'!B6

3) To add totals across 4 worksheets for values given for each theme park for each category.

Example: B6 contains the number of Ticket Sales for Adults for Animal World in each of the quarters
...Could write Quarter1!B6+Quarter2!B6 + ... and place this in Summary!B6

(Show how to create this by pointing and clicking....no grouped sheets)

Easier way: Define a worksheet range and use the Sum function

=Sum('Quarter 1:Quarter 4'!B6) or =Sum(Quarter1:Quarter4!B6)

(Show how to do this by entering =sum(click on quarter 1 sheet name and cell b6 and shift click quarter 4 and b6) Repeat across row and copy down using fill handle

Page Layout for a group

If a worksheet group has been created before defining the layout for a worksheet, you will be able to define the layout for all members of the group.

Margin...Horizontal Header/Footer –custom header with sheet tab and footer with name and date.

Extending references across workbooks – External references

Now suppose there are additional locations of Global Travel in Colorado and Utah. Further suppose that they have created a similar summary worksheet for four quarters of data. After receiving their workbooks, the corporate controller wants to consolidate the summary results into one sheet. Additionally, he wants to be certain that if changes are made to the individual workbooks, that the changes will be reflected in the overall summary. That is, he wants to link the workbooks

Create a link or connection between files that allow data to be transferred from one file to the other

Source file(s) **contains** data (in our case individual workbooks for New Mexico, Colorado and Utah.)

Destination file – (dependent file) **receives** data . (in our case that will be workbook Total 2010)

external reference -When you create a reference to a range in another workbook

[workbook name(include filetype)]worksheetname!cellrange

eg. [Colorado.xlsx]Summary!B6

however if spaces in workbook name or worksheet name, then put a single quote around the workbook name and enclose worksheet name as well.

'[New Mexico.xlsx]Summary'!B6 or/ '[Utah]Quarter 1'!B6

Be careful, this assumes that workbooks are in the same folder. If they are in different folders or on a network on different servers, then you must specify the path using ' ' around path and workbookname and worksheetname up to !.

'[C:\CS219\Tutorial5\tutorial\New Mexico.xlsx]Summary'!B6

p. 299 Do... Open all necessary workbooks at once...open to totals summary and enter = and then find desired cell in Summary of New Mexico and continue until completed.

Notice references: absolute...If want to copy then remove and make relative.

***Important to read p. 303 Managing Linked Workbooks and discuss how files will be sent for homework

Updating Linked Workbooks

Suppose that you want to change a value in the source....several scenarios.

All files open ---no problem then the destination is automatically updated.

Destination is closed but source is open. Next time that the destination is opened, you will be prompted to update you links. Security message appears in message bar under ribbon.

Breaking links

Suppose that you plan to continue working with source file but will no longer need to update the destination. You wish to archive the destination file and break the links.

Open destination....Data...Edit Connections and Break.

Creating an Excel Workspace

Workspace is a file which maintains info about a collection of workbooks to be opened collectively...maintains locations and paths of individual workbooks but does not actually contain the workbooks... allows you to refer to a single name and have others open

Creating a hyperlink

Hyperlink – used on Web to describe a link to a document on a web server or to a specific location within an html document.

Can generalize – link to a file in Excel which means can link from an Excel workbook to another file (example a Word doc) or another workbook or a worksheet within the Workbook.

Click on text in a cell that represents the hyperlink. Although text may flow into an adjacent cell be sure to select the cell that contains the link and not the overflowed text.

Select text, graphic or cell and **Insert - Links - Hyperlink**

From Link To List select

- existing file (location of file)
- web page (URL)
- Place in this document (point to desired cell)
- Create a new document (specify path)
- Email address (specify address)

Example in text: Create a hyperlink to Word document Sales 2010. Place the link in cell A12 of Documentation sheet. Enter text “Click here to read Executive memo”. **Insert – Links – Hyperlink-Link to list – Existing file**

Screen tip for a hyperlink tells you basic info about the path the link follows – this can be edited - rightclick on cell A12 Select Edit Hyperlink ScreenTip and change info.

Using templates

A workbook with labels, formats and formulas already built in is a template.

You could use an existing worksheet to accomplish this by erasing all data and leaving labels, formats and formulas but you may inadvertently keep some old data.

Templates cannot be overwritten. You must save as a file.

Templates have a different file extension .xltx . Excel workbooks have the .xlsx extension.

Download a template from Microsoft p. 314

Create a custom template

Can be saved to any location but if you wish to see it appear in Templates option when you create a New workbook, it must be saved where Office templates are stored on your computer.

Goto p. 317 of text

Save a Workbook as a WebPage

When you save an Excel workbook as a Web Page either SingleFile (mhtml) or Web Page(html) and place on the Web , users will be allowed to look but not change...scroll and switch tabs.

If you wish to make it interactive, you must use Microsoft Office Share-Point Server.